



# Ohana Insights

Tips for using PAF Insight and other tools

Ohana Software

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## Happy New Year!

I cannot believe it is already January 2008. This year should be an exciting one as more temple districts change over to the new FamilySearch and we release FamilyInsight. The year 2008 ought to herald the advent of improved family history participation, collaboration and records processing. I know there are still hurdles to overcome but the future holds great promise.

As I anticipate these changes, I have reflected on previous developments for family history that also thrilled us. I have been doing family history off and on for about 33 years so I remember the paper process for preparing names for temple work and the long family group sheets that you could find and copy if you were lucky enough to get to Salt Lake City. Along came personal computers and the first DOS version of PAF soon followed. That required a change in the way we entered our information. The data fields had size limitations and the 5.25 inch floppy disks only stored about 1.2 megabytes of information but we could enter information once, share it easily, and print charts and reports in many formats. Now PAF is available in a Windows format, comes in several languages, and provides us with a template for adding sources.

Other innovations followed. When the Ancestral File became available, we thought it was a marvelous way of sharing and preserving our family history and connecting to cousins that we did not know existed. I have had miracles come through the Ancestral File. Next, TempleReady streamlined preparing names without mailing anything to Salt Lake. At first, we did not mind loading the individual disks into the CD drive but when our centers became networked, we cheered. When all this became available on the FamilySearch website, we thought we had died and gone to heaven because we could do so much more work from home.

The new FamilySearch will be another leap forward for family history. You may not be aware that the new FamilySearch was built for a worldwide audience. This is not just for Americans or people of western European descent. It covers the needs of Asian, Latin American, Pacific Island and African nations, too. It is flexible enough to accommodate cultures with a variety of genealogical data sources and those with oral histories. Additionally, every web page, training video, and document is available in eight languages. We owe a debt of gratitude to all the programmers, training developers, translators, and testers who have dedicated years of work to bring this vast new

system to us. We wish each of them a very Happy New Year.

~ Cina Johnson ~

## **Insights into Insight: New Capabilities and Features - part II (New FamilySearch Sync)**

Although the beta version of FamilyInsight is not ready for general testing, I feel like a trailblazer as we approach our trek into the new world of the new FamilySearch. Like a scout who warns you that you will soon reach a large river, or a wagon master who organizes the group to ford the river, I look for ways to prepare you for the transition into the new FamilySearch and FamilyInsight. Hopefully, the more you know in advance the easier the shift when you arrive.

### ***What makes the new FamilySearch so different?***

Many things make it different but initially it is the vast number of records contained in the database. The records come from membership records of the LDS Church, temple ordinances for deceased people, and records from both the Ancestral File and the Pedigree Resource File. Obviously, there are many duplicate entries of the same person with various amounts of information. Think of each entry as a piece of paper with information about your ancestor. All the various papers need to be placed into a folder for that person. Your job is to look for the folders and carefully combine them before you try to submit names to the temple.

### ***What advice to you have for using the new FamilySearch and FamilyInsight?***

My first piece of advice is to ***learn everything*** you can about the new FamilySearch. If you do not understand how the records are organized in the new FamilySearch, they will seem very strange when you look at them in FamilyInsight. Once you see them in the new FamilySearch, you will be grateful to have FamilyInsight for synchronizing information. Adding information with FamilyInsight is simpler than adding the information manually, too.

Second, ***always keep in mind*** that although you are working with FamilyInsight and your PAF file, you are ALSO working with the online records. These records are SHARED and what you do in the new FamilySearch affects EVERYONE connected to that same family. This is especially important when you combine information. You will not delete anything but if you combine Martin LeRoy with Martin LeRoy and they happen to be father and son, or cousins, or brothers, with the same name, you and everyone else will have a mess to clean up. Before you combine records by marking them as a Match in FamilyInsight, it is imperative that you study the information. Use ALL the data on the screen to decide whether they are the same person and when in doubt, do not combine. Wait until you have more information.

With this in mind, my third piece of advice it to take your time. Experiment. Study the cause and effect. Grow in understanding. Our family history is a treasure and you need not rush through the work. If you do not understand something, take the time to learn more before changing things. If you see that someone has disputed information, read what they wrote before you make any decisions. You can also add an opinion or dispute existing information and thereby help others who look at the records.

Finally, since others will have vision to the same information, you may want to divide and conquer the job of combining. You do not need to eat the proverbial elephant by yourself. You can combine

one family line while a sibling or cousin combines another.

### ***How do I use FamilyInsight with the new FamilySearch?***

After using FamilyInsight to clean up your records, you can use the new mode to synchronize your records with new FamilySearch. Last month I said that FamilyInsight "...looks the same." This is true for the original modes but the new mode, **New FamilySearch Sync**, adds a few twists to seemingly familiar search features. Rely on the **Guide Me** feature, lessons, and *Ohana Insights* for help.

When you go to the **New FamilySearch Sync** mode, the program immediately begins scanning your names and marking their status. If you want to know what to do first, click the **Guide Me** button in the Tool bar. If you have selected a person on the list, the **Guide Me** button will tell you what you should do based on their status. Some status markings, such as **Merge Needed**, require attention before you can search. Others are warnings, such as **Not in main pedigree** but they do not inhibit your ability to search. If you click the **Search** button and nothing happens, check the status and take the appropriate action.

Once you click on **Search**, you will see a short list of possible matches. The higher percentage matches are marked **Decision Needed** and require you to either mark them as **Match** or **Not a Match** with your record. Records with lower percentage match probability are marked, **Decision Optional**. We recommend you look at these, too, as you may recognize some of them as being a match. After marking the records, you will be allowed to synchronize your record with the matching records in new FamilySearch.

Marking records as a Match performs two functions. It marks your records as a match to the new FamilySearch records and it marks the duplicate folders in new FamilySearch for combining into one folder. When you choose to synchronize your records with new FamilySearch, FamilyInsight will:

- Combine your records and all the records that you marked as matches into one record (folder) on new FamilySearch.
- Mark your record with an identifier matching it to the combined record in new FamilySearch.
- Allow two-way synchronization for information about your person between your file and new FamilySearch.

- Selected information can go from your file to new FamilySearch and from new FamilySearch to your file.

- Allow you to add a dispute to information in new FamilySearch that you believe is incorrect.

That should be enough to get you started on the right track. If you missed the previous articles about FamilyInsight in our October and December 2007 issues, please go to [www.ohanasoftware](http://www.ohanasoftware) and click on the Newsletter tab.

### **Quick Tip: Adding or Updating United States to US Places**

This training idea came from Sorena DeWitt, the co-director of the Mt. Timpanogos Family History Center in American Fork, Utah. Thank you for letting me share it with our readers.

Currently, the new FamilySearch does not recognize any US places that do not have United States at

the end of the name; therefore, you should change your records according to this current standard. When you team PAF Pal with PAF 5 you can quickly added USA to your US places and then update it to United States. If you do not have PAF Pal, use the Edit Places mode of PAF Insight.

First, **BACK UP** your records before you begin to safeguard your file.

If you have not already added USA to states or expanded the postal code abbreviations to fully spelled-out place names, do this:

- Open PAF and go into "Tools" and click the link to PAF Pal.
- The PAF Pal window comes up with several tabs across the top.
- Click on the **Clear/Change** tab first.
- Go to the second column, **Change Fields** and click on **Expand Place Abbreviations**. This changes the standard postal code abbreviations for US states, Canadian provinces, and English counties. I generally click all three to ensure I do not miss anything. The change is almost instantaneous.
- Check the report for accuracy then close it to return to the **Clear/Change** menu.
- Click on the button for **Add USA to Places With States**.
- Check the report for accuracy then close it to return to the **Clear/Change** menu.
- Click the **Close** button and return to PAF.

If you have expanded abbreviations and added USA, use PAF 5 to change USA to United States. Make another backup of your file. **Global Search and Replace** sometimes updates more than you expect and you will appreciate the safety net if it happens to you.

- Click on **Tools** and select **Global Search and Replace**.
- Under the heading for **Search and replace text in...** select the **Places** option.
- In the **Search for:** box, enter ", USA" (without the quotation marks).
- Use the comma and space before USA (all caps) so it does not replace "usa" in any places such as Saint-Usage, Cote-d'Or, France. In the **Replace with:** box, enter ", United States" (without the quotation marks).
- Carefully review the results to make sure you did not get any unexpected changes. If you find a problem, restore your file from the backup and try again. You may also want to repeat the process using ",USA" without a space between the comma and USA.

When I did this to my file, most of the status markings in FamilyInsight changed from **See Suggestions** to **Recognized**.

If you do not have PAF Pal, check to see if it is available at your Family History Center or use the **Edit Places** mode of FamilyInsight.

## **Odds and Ends**

**Family Insight:** We are still working to get FamilyInsight ready for Beta testing. Thank you for your patience and enthusiasm.

### **New Promotion for WorldVitalRecords**

WorldVitalRecords updated their promotion page for Ohana Software customers. The new price is one year of WorldVitalRecords for \$39.95 (vs. \$49.95) and two years for \$59.95 (vs. \$79.95). This

is a special offer for our customers and NOT the general public.

Link to **World Vital Records discount** for Ohana Software customers --  
[WorldVitalRecords Discount link](#)

When you register with WorldVitalRecords, you will enter your email address and create a password. Please remember this password so you can login on their website. If you have any support questions, you should contact WorldVitalRecords directly. You can email them by going to their website at [www.worldvitalrecords.com](http://www.worldvitalrecords.com) and clicking on the **Contact Us** link at the bottom of every webpage or call them toll-free at 1-801-377-0588.

## **Calendar Items**

### **Feb 8-9, 2008**

**St. George Utah Genealogy and Family Heritage Jamboree sponsored by My Ancestors Found**

~ John Vilburn, owner of Ohana Software, will be a presenter. ~

Dixie Convention Center

1835 Convention Center Drive

St. George, Utah

[Registration and information](#)

**March 1, 2008** - 8:00 am until 4:00 pm

**Buttercup Family History Fair**

**Just Do It -- We are Waiting**

Buttercup Family History Center

1600 E Buttercup Dr.

Sandy, Utah

More information will be posted later

**Computerized Family History and Genealogy Conference March 14 and 15, 2008**

~ John Vilburn, owner of Ohana Software, will be a presenter. ~

Conference Center on BYU campus

For registration information, contact: BYU Conferences and Workshops

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